



User Guide for Participants

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GROVESITE

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GroveSite: Web Collaboration Made Easy

*This User Guide will help you easily navigate your group's
GroveSite-powered website and use all of its Participant Features*

GroveSite is a tool that can help any working group collaborate using its own website. Using GroveSite, your group can build its website, add or change information instantly, and keep all its information in a secure environment on GroveSite's servers. Your group can use its website to streamline communications to you, to centrally manage important documents and files, and to help you collaborate with other members via website discussion forums and shared file libraries. All you need is a browser with access to the Internet, and the login ID and Password emailed to you by your group's GroveSite Administrator.

All kinds of working groups can use GroveSite to power their websites: associations, corporate or consulting project teams, legal case teams, committees, task forces, seminar groups, schools, publishing teams, real estate groups, professional groups, and so forth.

GroveSite refers to members of a group as Participants. Some individuals in your group will have the roles of Organization Administrator, Site Administrator, and Moderator of your group website.

- **Organization Administrator:** Initializes the group website. Can create many websites, each for a different group within your company or organization.
- **Site Administrator:** Sets the website's access and security levels. Defines website pages. Enrolls members of the group in the website.
- **Moderator:** Places most of group's information, images, and files on your group's website. Sends you all broadcast emails.

This User Guide is intended for individuals who are enrolled as Participants in a website. Anyone enrolled as Moderator, Site Administrator or Organization Administrator, should also read a separate user guide, “Getting Started: User Guide for Administrators and Moderators.” This can be printed from www.grovesite.com.

The Administrators and Moderators have created your group’s website and placed information on it. The Site Administrator enrolled members in the website. As a website Participant, your first contact will be a welcoming email from the Site Administrator, as described in the following section.

Welcome to Your Website

Your Welcoming Email Message

You will first receive an email message from your group’s Site Administrator, welcoming you to the group’s website. The email message contains helpful messages and instructions and three important GroveSite items:

§ URL: This is the Internet address of your group’s website. It may look like one of these

<http://www.grovesite.com/page.asp?o=xyzco&s=projabc>
<http://xyzcompany.grovesite.com/page.asp?o=xyzco&s=projabc>

For SSL (high security) sites, the URL will look like

<https://secure.grovesite.com/page.asp?o=xyzco&s=projabc>

Don’t worry if it looks complex – you will rarely, if ever, have to type it in.

§ ID: GroveSite uses your email address as your ID for login.

§ Password: Your password was assigned by GroveSite or by your Site Administrator. You may change your password once you’re at your group’s website. Please protect your password, to help ensure that your group’s website is not accessed by unauthorized individuals.

The email message may also contain other helpful messages or instructions. You may want to print the message.

Go to Your Website

Click on your website address (the underlined URL) in the email message to go to your website. Alternately, you may copy (Cntrl/C) the website address from the email message, then paste (Cntrl/V) it into your browser's address window.

Save Your Website Address

When you click on the URL, your browser takes you to your group's website. You may want to save the website address now. If you use the Explorer browser, click on 'Favorites,' then 'Add Favorites.' If you use the Netscape browser, click on 'Bookmarks,' then 'Add Bookmark.'

How to Login

Login form (non SSL sites)

1. Enter the URL in your browser address window to get to your website (or use your Favorites or Bookmarked URL). You may also use your welcoming email message and click on the underlined URL of your website. Either way, you will either
 - a. Immediately see the login form, or
 - b. Be at the website home page. Look in the upper right menu bar to find the **Login** button, and click on it. The login form will be displayed.

OR

2. Go to the GroveSite home page at www.grovesite.com. Find the **Login** button on the upper right menu bar and click on it. The login form will be displayed.

Login form (SSL sites)

Go to the GroveSite home page for secure sites at <https://secure.grovesite.com>. Find the **Login** button on the upper right menu bar and click on it. The login form will be displayed.

Complete the login form

Position your cursor at the Email Address ID box and type in your email address. This is your GroveSite ID. Position your cursor at the Password box and enter your password.

If you click the box 'Save my ID and password in a cookie,' GroveSite will automatically log you in, without requesting your email ID and password, in the future. However, if other individuals use your computer, or your site contains highly confidential information, you should NOT check this box.

Now click on the **Login** button in the form.

First time login

The very *first* time you log in, GroveSite displays several messages:

- GroveSite System Message: GroveSite takes all websites down for a brief time each week to install new programming features, correct bugs, and so forth. This message tells you when your website will be unavailable.
- Acceptable Use Policy: This policy states that you cannot use the website for illegal uses, attempt to breach security, share other users' personal information with third parties, and so forth. Please use your scroll bar to read the policy carefully; if you accept, click the **Accept** button at the bottom of the screen. If you click **Reject**, you may not login.
- 'Manage My Information': GroveSite allows all users to maintain personal information in their group's website. This form displays your personal information and allows you to add, edit, or delete information. The only required fields are (1) Email address, (2) Password, and (3) Display name. You may change your password. If you don't want anyone to see your email address or name, you may elect to hide your Email address or enter a different Display name. Click on any **Save** button to save your changes and exit this form. You may come back to this form at any time, by clicking the **My Info** button on the upper right menu bar. See the 'My Info' section in this User Guide for more information.

These messages and forms will only be displayed the first time you login to any GroveSite-powered website.

Forgot your password?

If you are in the Login form and can't remember your password, click on 'Forgot your password.' GroveSite will request that you enter your email address and send you an

email message with a new password. You can then change your password anytime, using the My Info feature.

Screen Layout and Site Navigation

Screen Layout

GroveSite-powered websites have a common screen layout. The different parts of the screen are described here.

- **Logo:** This is your organization's logo or name, in the upper left portion of the screen.
- **Site Header:** This is your group's name. For example, it may be a project, seminar title, association section, and so forth. It is in the upper right.
- **Menu Bar:** The Menu Bar is the horizontal area at the upper right that contains buttons with GroveSite commands, such as Help Desk, My Info, and My Sites. Once you login, GroveSite will display those commands you are authorized to perform based on your role (Participant, Moderator, Administrator).
- **Site Navigation Area:** This is the left-hand side of the screen. The Site Navigation Area displays names of the various pages in your group's website. GroveSite only displays those pages for which you have access.
- **Page:** The large area to the right of the Site Navigation Area is the Page display. It displays the content of the selected page.
- **Site Footer:** This is the horizontal area across the bottom of the screen. On the right side is contact or copyright information for your organization. GroveSite is displayed on the left, along with a 'Submit Feedback' link by which you can submit questions or report bugs to GroveSite staff.

Site Navigation

How to view pages

To view any page, just click on its name in the left hand Site Navigation Area. If the page has 'section headings' those will be displayed in the Site Navigation Area, and you can click on those as well.

Long or sectioned pages

Use the scroll bar to view long pages. If the page you are viewing has 'sections,' you may navigate between sections using sections headings on the Site Navigation Area or links on the bottom of the page.

Links to external websites

Some of the names listed in the left hand Site Navigation area are actually links instead of pages. Some links may lead you to external websites. To return to your group website, use the BACK button on your browser.

Links to other GroveSite websites

If the link you have clicked on is another GroveSite group website, you will be positioned in that website. If you are an enrolled member of that site, too, you will not have to login again. Most related GroveSite websites have a "Return to ____" in the Site Navigation area to return to your starting point. If not, click on the **My Home** button in the upper Menu Bar. Click on the site name you want to go to.

My Info: Manage Your Personal Information

You Control Your Information

GroveSite allows you to manage your personal information. Click on the **My Info** button in the Menu Bar. You will get a form that displays the information you have entered, or that was entered when you were enrolled in the website. Email address, Password, and Display Name are required fields. All other fields are optional and may be blank if you wish.

- **First name and Last name:** These fields may have been entered by the person who enrolled you in the website. You may edit or delete them.
- **Display name (Required):** If your first and last names were entered during enrollment, GroveSite uses them for your Display name. If they were not entered, GroveSite uses the first portion of your email address, up to the @

symbol. You may change the Display name if you wish. The Display name is displayed when you post discussions or upload files.

- **Title, Company, Phone:** This information, if you enter it, is displayed on a Participants List page, which lists all people enrolled in your group's website.
- **Bio:** Enter any biographical information you wish about yourself. This information is displayed if another member viewing the Participant List page clicks on your Display name.
- **Picture:** If you like, you can upload your photo. Use the **Browse** button to locate your photo file on your computer/network. Files must be .jpg or .gif format and less than 50Kb. GroveSite will resize them to be 100 pixels wide. Photos are displayed on the Participants List page.
- **Flag information as 'new' for how long:** This setting is used to highlight new discussion postings with a blinking green flag. Choose 1 day, 3 days, 1 week, or 1 month, depending on how often you access your site. Any discussion posted by another person within your time period will be marked as new. Your site may be set up to flag new content on regular web pages, as well.
- **Email address (Required):** This is the email address you use to login. If you do not want it displayed, you can choose to 'hide' its display from other Participants by checking the box just below it on the form. In general, GroveSite discourages this because it hinders collaboration among the group. If you hide your email address, you will still be able to receive Broadcast email.
- **Send on behalf?** Some organizations have implemented 'anti-spam' software on their email servers. If you have trouble sending or receiving GroveSite email notifications, check this box and try again.
- **New password/Confirm password:** If you want to change your password, position your cursor here and type the new password. Then type it again in the Confirm password field below.

Click the **Save** button on the bottom of the form to save your changes.

Change Your Password

Click on the **My Info** button in the upper Menu Bar. The Manage My Information form appears. Scroll down the form to find the New Password field. Enter your new password. Enter it again in the Confirm password field.

Click the **Save** button on the bottom of the form to save your changes. Your new password applies to all your GroveSite websites.

My Home

You may be enrolled in several GroveSite-powered websites simultaneously. For example, you may be participating in three projects at work, each using a website for project management and collaboration. GroveSite keeps track of all your enrollments. Once you login, you can navigate between websites by clicking on the **My Home** button in the Menu Bar. This displays a form listing your websites as well as your current tasks and calendar events.

The list indicates which sites have some new discussion, and new content with small green flags. Sites designated as high security SSL sites are also indicated on the list.

Change to a different website by clicking on it in the list, or click on the **Cancel** button to return to your current website. You can move between websites easily, without having to login again when you return. Note: If you move from a secure SSL site to a non SSL site (or back) you may be asked to login again.

Collaborate with Other Participants

View Participant Information and Bios

Click on the Participants page in the Site Navigation area. Scroll down the list to see who is enrolled. If you click on their Display name, you will see any biographical information they have entered about themselves. Note: participants enter their own information. It is not verified.

Send Email from the Website

You can send email to anyone in your group from within the website. Click on the Participants page in the Site Navigation area. Scroll to locate the individual you want to send email to. Click on the Email Address displayed, and you will get an email message form.

How to Participate in Discussions

Certain pages in your group's website may be discussion forums. There are two display modes: Summary View and Expanded View. The Summary View displays the subject given for each comment and reply. The Expanded View displays the message text and any attached files. In all views, the person posting the discussion is listed at the right.

Start a Discussion

Click on a discussion page. To begin a new line of discussion by entering a question or comment, click on **Add a New Posting**. You'll see an Add New Posting Form with three fields: Subject, Message Body, and Attach File. Typically, you would enter the Subject and Message Body fields. Optionally, you may attach a file. Use the **Browse** button to locate and select your file on your computer/network. *GroveSite will automatically notify you via email whenever someone replies to your posting. If you do NOT want GroveSite to notify you, uncheck the "Notify me" box.*

Click on the grey **Add posting** button to post your item. All new lines of discussion are enumerated with whole numbers, such as 1. or 2. They are listed in chronological order, with the most recent items listed first.

Reply to a Discussion Posting

To reply to another person's question or comment, simply click on their comment. You will see a form displaying the text of the original posting, and the text of all replies to date. Fill in the Subject and Message Body. Attach a file that supports your reply, if you like, using the **Browse** button to select your file. If you would like GroveSite to notify you of other replies on this thread, check the "Notify me" box. Click **Post reply** to post your reply.

Replies are displayed beneath the original comment and numbered 1.1, 1.2, 1.3 and so forth. When you reply to a posting, the person to whose posting you are responding will be sent an email stating that a reply has been made, and will be directed to the website. Click **Close** after viewing the message confirming that email was sent.

Delete a Discussion Posting

You may delete anything you've posted by clicking on it, then clicking on the Delete button on the form displayed. Note that if your posting is the first in a thread, the entire thread will be deleted.

How to Get Help

Web-based Help Desk

Click on the **Help** button on the Menu Bar from any GroveSite-powered website. The Help Desk contains much of the information in this User Guide, as well as information from the User Guide for Administrators and Moderators.

On-line Feedback

In the bottom left corner of every page of your website, there is a Submit Feedback link. If you think you've found a bug, or have a question or comment, click on this link and a Feedback form will appear. Enter your email address and phone number (optional) and select the category of feedback:

- General comment
- Request for information or new features
- Bug in the site
- Error while using the site

Enter a Subject and your Feedback. Click the **Submit Feedback** button. Your feedback will be reviewed by GroveSite personnel and sent to the appropriate staff for a response. We'll try to get back to you within the next business day.

On-line Forms Help

Most GroveSite forms used to add or edit content have context-sensitive help screens available. If the field name on the form is blue, you can click on it and get an instant Help screen.

Printable User Guides

You're reading one of our User Guides. We update our User Guides frequently, as new capabilities are incorporated into GroveSite and to answer common questions. Check www.grovesite.com to print the latest User Guides.

Training by Phone

GroveSite Customer Service personnel provide assistance to new Administrators and Moderators over the phone. We'll be happy to walk you through your initial GroveSite usage. After a reasonable period of time, as your group becomes more familiar with GroveSite, we expect that you'll quickly train your own new users.

Telephone Customer Service

866-952-9880 or 602.952.9880

Customer Service personnel are available to answer GroveSite's toll free number at the hours posted on www.grovesite.com. We can assist with general usage questions, how to post content, training and billing questions.

Telephone Technical Support

866.952.9880

Technical Support staff is available during the business hours posted on www.grovesite.com. Free technical support is provided for technical difficulties (bugs, errors or other technical problems) with the GroveSite software or hosting platform. Other assistance will be charged.